

# Snapshot

## Probability of success of Proposed plan



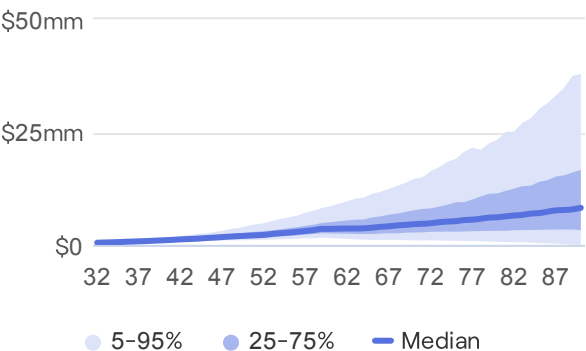
**\$575.43k**  
Net worth

**16.4%**  
Effective federal  
tax rate

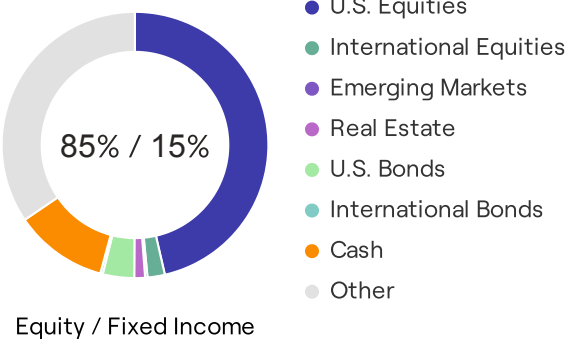
## Balance Sheet

Bank	\$116,941
Invested assets	\$392,485
Real estate assets	\$350,000
Life insurance cash value	\$0
Other assets	\$0
Credit cards	\$0
Mortgages	\$284,000
Home equities	\$0
Student loans	\$0
Other debts	\$0
<b>Net worth</b>	<b>\$575,426</b>

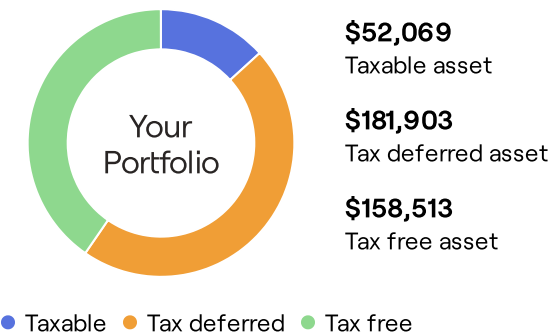
## Asset simulation results of Proposed plan



## Current allocation



## Tax allocation summary



## Recommendations

1. Establish two Roth IRAs to maximize tax-free retirement savings
2. Rebalance 401k account to include more international equities.
3. Establish HSA account through employer and start contributing 10% for future healthcare costs.
4. Meet with estate planning attorney to discuss setting up a living trust for grandchildren.